

APPENDIX

CHINA'S NINTH FIVE-YEAR PLAN

The Following contains translated excerpts from the ninth Chinese "Five-Year Plan", describing proposed development and growth for the years 1996-2000. It is provided here to give interested readers a direct listing of what the Chinese intend to do; following the philosophy that the best sources of intelligence on Chinese intentions, is the Chinese government.

The priorities in China's Ninth Five-Year Plan for industrial development and the readjustment of the industrial structure are to:

1. Strengthen water conservancy construction, maintain steady agricultural growth, and promote all-round development of the rural economy
2. Speed up the development of basic industries and infrastructure facilities by launching a number of key projects related to the construction of railways, ports, highways, airports, petroleum plants, coal mines, chemical plants, and iron and steel works
3. Transform and reorganize the light and textile industries by raising their technological level and improving the quality and grade of their products
4. Actively invigorate the pillar industries (the electronics industry should focus on developing integrated circuits, computers and telecommunications equipment; the petrochemical industry should focus on the production of ethylene; the automobile industry should focus on the production of sedans, lightweight vehicles, as well as parts and components; the building industry should focus on the construction of residential housing, public facilities, and industrial facilities, as well as the development of new building materials)
5. Accelerate the development of the tertiary industry, and establish a healthy market system and a community service and social security system
6. Strengthen the development and application of technologies crucial to economic and social development, and promote the translation of research results into real productive forces.

During the Ninth Five-Year Plan (1996-2000), China will strive to increase the annual output of raw coal to 170-220 million tons. The construction of coal mines will be accelerated¹; the policy of opening the coal industry to the outside world will be continued; and departments in the power, metallurgical, and other industries will be encouraged to invest in mines to produce new sources of capital. Foreign enterprises will also be welcome to engage in mining in China through equity and contractual joint ventures or other modes.

The industrial structure will be readjusted in accordance with the idea of comprehensive development and diversified operation. Coal-mining enterprises will be encouraged to build coal washing and dressing plants, as well as power plants, coking plants, and coal-chemical plants. These enterprises will also be encouraged to exploit

¹ In the development of state-owned coal mines, priority will be given to seven large open-pit mines, including those at Pingshuo, Shenfu, Dongsheng, and Jungger. In the development of local state-owned mines, work on 15 commodity-coal production bases at Xinji, Jixi and other places will be expedited. At the same time, attention will be paid to the development of 100 major coal-producing counties in an effort to transform and upgrade the existing township mines.

and utilize their regenerative coal resources, and to promote the simultaneous development of coal-mining, power generation, and road and port construction where conditions are favorable. A variety of cooperative avenues will be adopted to pool funds for the construction of a number of large energy bases that combine coal transportation with power transmission meeting the needs of the country. Government discount credit will be used to expedite the development of key multi-function projects (HKTDC 1995).

In order to attract foreign investment, the State Planning Commission has drawn up regulations to govern “build, operate, and transfer projects” (BOT) and submitted them to the State Council for approval. Under a BOT agreement, the government authorizes an investor to build a project and operate it for a set period of time, after which ownership and rights revert to the government.

A temporary BOT administration regulation was issued last year by the commission, the Ministry of Communications and the Ministry of Power Industry. Under the regulation, the BOT method is confined to infrastructure projects, including hydroelectric power plants with a capacity of at least 250,000 kilowatts per hour, thermal power plants with a capacity above 600,000 kilowatts, high-grade roads 30-80 kilometers long, bridges and tunnels more than 1,000 meters long, and urban water supply plants (HKSTD, March 26, 1996).

According to China's Ninth Five-Year Plan, China will make the automobile industry one of their backbone industry. China is expected to produce 2.7 million automobiles, which can meet more than 90% of the domestic demand by 2000. To attain the target, emphasis would be placed on the development of auto parts and components, economy cars, and heavy-duty trucks. It is estimated there will be a market for about three million cars by 2000, with demand reaching five to six million by 2010. The plan also calls for conglomerates, with annual production capacities of more than 400,000 cars each, to be formed from the merger of two to three automobile manufacturing groups² (HKSTD March 15, 1996).

The electronics industry has become one of China's pillar industries. Between January and June 1995, the total output value of China's electronics industry amounted to 106.58 billion yuan, up 28.7% from the same period in 1994.

During the Ninth Five-Year Plan period, China is set to promote national economic information by implementing a series of Golden projects, with emphasis being placed on the Three-Golden projects.³ Information resources will be put to effective use in achieving modern management in important areas such as banking, finance, taxation, industrial production, education, and macroeconomics control, as well as in achieving office automation for government departments. The application of electronic information technology will be promoted in the whole country to allow the people to become better informed.

The overall strength of the electronic industry will be further enhanced. The major economic targets for the year 2000 are:

1. Annual growth of over 20% for the whole electronic industry
2. Electronic industry total output value of 500-600 billion yuan (10% of China's total industrial output value)

² There were 165 plants engaged in car assembly in China last year, each producing a little more than 8,000 automobiles on average. China has 22% of the world's population but produces only 2.5% of the world's automobiles.

³ They are the Golden Bridge project which involves the establishment of a national public computer network system, the Golden Card project which is a network for promoting the use of credit cards, and the Golden Pass project which involves the establishment of a paper less transaction system for international trade.

3. Annual sales of 400-500 billion yuan
4. Exports of electronics products totaling US\$25 billion (11% of China's total exports).
5. Emphasis on the production of integrated circuits, computers and computer software, and telecommunications equipment.
6. Consumer electronics development.

China will strengthen its ability to develop new products and utilize technological advancement to promote industrial development. Special attention will be paid to the four major areas of microelectronics technology, digital technology, software technology, and network technology. By the year 2000, new generations of products using digital technology will dominate the market. Also Chinese-language information processing technology and related products, digital program-controlled switched, color TVs, and VCRs will reach international advanced levels, and economy of scale will be achieved in production (HKTDC 1995).

China is aiming for exponential growth in its information technology industry by the year 2000, with massive increases in production of integrated circuit (IC) chips, computers and peripherals, telephones, and optic-fibers. According to the Ninth Five-Year Plan, by 2000, China will produce annually 2.5 billion computer IC wafers, a seven-fold jump over 310 million produced last year.⁴ The total capacity of telephone exchange boards is also to soar to 174 million lines, more than double last year's figure of 85 million. China also aims to expand telephone sales by 2000; 7% of Chinese families are forecast to own a phone, up from 4.6% in 1995. Color television ownership is expected to jump to 60% from 42%.

The electronics industry is to become one of China's backbone industries. The country also plans to develop card-form equipment, new computer monitors and photo-electric equipment, and build up production and an export base for computers, peripherals, and boards. China aims to develop basic and application software according to international standards, laying the ground for their eventual export. The country also plans to improve the development and production of digital telephone exchange boards, mobile and optic-fiber communication equipment, and digital consumer electronics.

For long-distance telecommunications, the Five-Year Plan calls for building up an optic-fiber trunk line network.⁵ By the year 2000, long-range, optic-fiber lines should have a total length of 210,000 kilometers. National information infrastructure facilities are to be built up, supported by broad-band multi-media digital technology. For conventional telephones, the country aims to build up and perfect a nationwide network with mainly program-controlled exchange boards. By the year 2000, the total exchange board capacity should reach 174 million lines, 89 million more than the 1995 figure.

Computer sales will take off exponentially when around 10% of families have a computer and social pressures encourage other households to buy. Rapid growth in household purchases of personal computers is expected in

⁴ One of its tasks is the mass production of six-inch wafers with the 0.8 micron IC. The electronic industry is to mass produce eight-inch wafers with the 0.5 micron IC while at the same time carrying out research and development on 0.3 micron technology.

⁵ Telecommunications is one of China's fastest growing industries. This year, Beijing plans to spend more than 100 billion yuan on telephone lines, switching equipment, and the like. That's 15 times more than it spent in 1990.

China after 220,000 families bought PCs for their homes in 1995. Sales of personal computers in China rose 54% last year from 1994.⁶ (HKSTD March 18, 1996).

Shanghai is the site of one of the world's most advanced combinations of computers and telecommunications. By late next year, Shanghai subscribers should be able to order a movie, bank at home or hold a teleconference with people worldwide. International Business Machines Corp., the world's largest computer maker, is betting the system will work well enough to persuade telephone companies and governments in China to make it their model and IBM their supplier. Half of China's 31 regional telecommunication authorities are talking to IBM about building their own system,⁷ IBM said (HKSTD, March 12, 1996).

⁶ Household purchases of computers accounted for 20% of China's personal computer sales last year. Statistics show that about 5% of families of Shanghai, China's largest city, have bought computers, with the number expected to grow to 20% in 1997.

⁷ There's the possibility of selling a big system to the Agricultural Bank of China to link computers in its 49,000 branches or to the Ministry of Railways, which must keep track of almost four million employees.

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- EinC: see *Energy in China*
- IWPDC: see *International Water Power & Dam Construction*
- OSD: see LBNL "An Overview of Energy Supply and Demand in China"
- TCMTIP-PRC: see *Private Power in China*
- Ishiguro: see *The World Bank* "Energy Demand in Five Major Asian Developing Countries"
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